

# **Future Directions for the Safari Hunting Industry of Zambia: At a Crossroad of Opportunity**

**A working group document to promote dialogue and consensus  
among the key stakeholders in the safari industry of Zambia**

**Produced by ZWA/NPWS**

**Coordinated by the USAID ADMADE Sustainability Project**

**Wildlife Conservation Society, New York**

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## **Executive Summary**

The goal of any industry, simply put, is to make more money. This requires producing more goods of sufficient quality and being able to market them at the best price possible. The safari industry is no exception. Related to this industry in a very important way are the rural communities who live with wildlife. Their goal through the ADMADE policy is to earn sufficient income from wildlife to improve their quality of life. Both the industry and the local community have seen a relatively static level of income from the safari industry in recent years. There is justified concern that these levels are not sufficient to motivate and support communities to effectively protect wildlife throughout the more than 150,000 km<sup>2</sup> of game management areas. As a result the resource base is vulnerable to degradation and decline, thus reducing Zambia's ability to compete in the industry. Any other means of protecting wildlife in these game management areas without direct support and involvement of local communities are probably unaffordable and unsustainable.

One key, underlying challenge, therefore, is to not only ensure the safari industry increases its revenue earning capacity, but to also ensure the community, as the bona fide wildlife producer, receives a more incentive-driven value of the resources being marketed. The first step is to undertake a thorough analysis of the potential that exists in this industry and the critical constraints or weaknesses that may be preventing Zambia from realizing its full market share in the hunting tourism industry. This paper has undertaken this analysis through an active process of dialogue with Professional Hunters Association of Zambia, Safari Operators Association, local community leaders, various conservation advocacy groups, Government leaders and technicians as well as drawing from the results of previous studies.

The analysis revealed a complex set of interacting factors that are contributing to significant losses of income and are creating serious threats to the viability and competitiveness of the industry itself. This paper argues that corrective measures do exist for negating much if not all of the effects these factors are having and that within a relatively short period of 3 to 5 years, revenue flows into the national economic could grow by more than 300%. National leadership, partnership among the key industry players, and a collective resolve to act and test possibly new and innovative ways of improving Zambia's competitive advantage will be the keys to this industry's future and probably the future of Zambia's wildlife.

Now, perhaps more than ever, the industry is at a crossroad of opportunity. Never before has so much information been available to provide the basis for the analysis undertaken by this study. Nor has the industry ever had a more committed and knowledgeable set of stakeholders seeking solutions to the problems this industry faces. It is the hope that this document will help Government make the necessary decisions needed to ensure the final direction taken at this important crossroad will be the right one.

## Introduction

The safari industry of Zambia is intricately linked to communities living near or inside game management areas. This is because they have a direct influence on safari hunting products, namely number and quality of trophy animals and the pristine, wilderness experience clients expect to find when hunting in these areas. In recent years both clients and industry stakeholders have expressed disappointment and growing concern over the declining quality of safari products in many parts of Zambia. This paper will show these concerns are real, represent serious threats to the future of this industry, and require strategic policy changes on wildlife use if these threats are to be overcome.

It will also be shown that Zambia's safari industry could be contributing annual income flows into the national economy at levels reaching \$15 million within the next 5 years rather than current levels of about \$5 million. South Africa, for instance, has an annual turnover of 5000 safari hunting clients and is grossing about \$115 million for the whole industry (Child, 1997). This remarkable achievement has been made largely on private, non-communal lands through intensive management of wildlife populations and absolute control over land use disturbances. This achievement also underlies the critical importance of providing the wildlife producer with the legal right to earn the full financial rewards from whatever investments, labors, or risks the producer undertakes. Because wildlife ownership rights were given to private landowners in South Africa, wildlife was restocked on private lands and investments were made to restore habitats from previous land uses. As a result, many landowners shifted from cattle to wildlife production. The reason for this shift was simple: profit margins were vastly higher, enabling the industry to employ more people and ultimately invest more in the resource.

The key question for the Zambian Government and community landowners of safari hunting areas is whether they wish to compete in this international market. If the answer is yes, current policies that govern how wildlife is managed and used in Zambia's game management areas will need a careful review with a resolve to make the necessary changes that will create a strong competitive advantage to Zambia's safari industry.

Through the efforts of the ADMADE program, there has been the implicit assumption that the Zambian Government is committed to developing the full economic value of Zambia's wildlife resources for achieving three major goals:

- 1) sustain income flows from safari revenues to effectively conserve wildlife through a co-management process with local communities,
- 2) provide economic benefits that will significantly improve the quality of life for residents living in wildlife areas, and
- 3) provide Government with an improved tax base to support national needs of social services throughout the country.

While ADMADE's vision for wildlife in Zambia has not deviated from these three goals, concern that this assumption is flawed has risen in recent years due to continued problems emanating from unclear and sometimes misdirected policies and procedures that regulate the industry. Excessive overuse of wildlife resources by the non-commercial sector has become well publicized in the sport hunting publications with adverse effects on Zambia's

attractiveness as a hunting destination. Hunting quotas are frequently not well controlled, resulting in periodic abuse. Involvement by the local community in setting and allocating quotas has been marginal, with the probable effect of lowering any sense of ownership or responsibility for wildlife by the community. Licensing procedures are generally awkward with cumbersome procedures that limit the way operators market their products. Land use disturbances within hunting areas are numerous and continue to erode product quality, and efforts to embrace the community in ways that would reverse this trend has been poorly coordinated and supported.

Against this backdrop of disturbing trends, this paper provides a detailed economic analysis of the safari industry. This analysis focuses primarily on threats and constraints affecting the industry, their economic consequences, options for corrective actions, impact on the resource and financial projections for the industry. The ideas and motivations behind this paper were drawn from a long process of consultation with the industry's key stakeholders: clients, professional hunters, safari operators, community leaders, Government leaders, and marketing and advocacy groups. It is for this reason this document is referred to as a "working group document", as its purpose is to consolidate the views and facts most pertinent for guiding this process of consensus building in reaching a conclusion that best represents all parties involved.

Finally, this paper is emboldened by the support and contributions it has received from these stakeholder groups and underlies a unified spirit in Zambia for decisive leadership to reinvigorate the safari industry, to protect Zambia's wealth and ultimately to safeguard the future of wildlife in this country.

## **Product quality: what the buying market wants and what Zambia offers**

### An overview

Safari hunting is a buyer's market, that is, clients define what they want and the industry adapts their products accordingly. Safari operators who fail to meet these needs do not compete or survive, as would be true with most industries. Safari hunting clients generally base their purchasing decisions for safari hunts on the following:

- 1) a high probability of finding quality trophy animals of selected species,
- 2) pristine hunting areas without human disturbances that might interfere with the hunt or the wilderness experience,
- 3) a fair and competitive price for the hunt,
- 4) knowledgeable, honest, reliable professional hunter, and
- 5) well stocked camp that is well run and fully equipped.

To a lesser extent but with growing importance, clients are showing a preference for

- 6) safari hunts that contribute in some way toward the conservation of wildlife and the well-being of local people who live within or nearby the hunting area.

Collectively, these requirements constitute the level of standards the industry must attain to be competitive in attracting clients. In the Zambian case, items 1 and 2 from the above list depend largely on the willingness of resident communities to protect wildlife and provide clients with a disturbance-free hunting experience. A great many variables influence the level

of community commitment in achieving these objectives. While the ADMADE program addresses many of these variables, some require the explicit and firm support of Government policies that recognize local communities as wildlife producers and therefore the primary beneficiary for maintaining wildlife on relatively pristine, disturbance-free lands.

Government procedures on licensing hunts that reduce the commercial value of wildlife and the retention of a major share of license fees weigh heavily on items 1 and 2 and have tended to undermine community commitment to produce wildlife.

In terms of item 3, Government plays a critical role for determining how competitive the prices of safari products are. Unlike most private sector entities, government, as opposed to the producer or its private sector partners, determines a major share of the price tag of safari products. Government sets for example, animal fees and hunting rights fees, which currently account for nearly 30% of a safari hunt's cost. In addition, Government also regulates the procedures for how, when and where payments are made, based on two types of hunting safari, each with their own restrictions. Such regulations tend to be restrictive and may constrain operators in how they package and price their hunts to compete with operators from neighboring countries.

Items 4 and 5 depend almost solely on the operator's ability to provide adequate resources to support and maintain both professional guiding services and material needs of the client. Government and perhaps the private sector itself have the responsibility of ensuring the highest standards possible are kept for such services. Unless these standards are kept, experience has shown individual safari operators will compromise product quality for short-term profit, resulting in negative consequences on how the buying market perceives Zambia as a hunting destination. As a result other operators' ability to market their own products are compromised.

Government, private sector and communities are the three parties key to safari hunting on communal lands. Coordinating them to influence a more favorable marketing environment for Zambia's safari industry has been a slow and difficult process in Zambia. One reason is the vast geographic distribution of safari hunting areas and the remoteness of community landowners lacking effective means to communicate. In addition, wildlife on communal lands is considered State property and regulations affecting its use has historically been based on Government policies that were developed without effective dialogue among its other partners. In past years this has given rise to public sentiment of political interference by vested interests as opposed to more free-market development of the industry. Finally, communities have not been regarded as wildlife producers but have historically been viewed as sources of poachers and disturbances to the industry. Not surprisingly, constructive dialogue to build partnerships with local communities has been slow in developing.

Safari hunting on a privately owned game ranch is managed under single ownership, and the entangling relationships with Government and local communities do not generally apply. In addition, wildlife is considered private property on game ranches and game licenses imposed by Government are not required. Game ranches also differ with communal hunting areas by being on smaller parcels of land with perimeters that are usually fenced. This allows the private landowners to more intensively manage wildlife production with the competitive advantage of being able to sell animals of known numbers and quality. These differences give game ranches the distinct advantage in being able to not only control disturbances but also provide clients with near guarantees of finding the trophy animal they wish to hunt.

### Game ranches versus communal hunting areas

A comparison between product quality offered by game ranches with that on communal lands is particularly germane to understanding what Zambia's safari hunting industry is currently offering the international market. Broadly, safari game ranchers exclude most all other forms of wildlife use except international clients. In addition, they have an almost total control over pricing and management to maximize profits. In contrast, communal lands are currently not protected or regulated in such a way to provide this level of exclusivity for safari hunting nor is there the same level of freedom to market animals in ways that promote wealth generation for the parties involved. Furthermore, clients are exposed to a range of human activities that often interfere with hunting. As a result, clients may feel local residents, or Zambia in general, do not welcome them, despite paying a large sum of money with the belief that the industry is for the benefit of Zambia's people.

Table 1 below presents the relative advantages and disadvantages of operating a safari industry on communal lands versus private game ranches in Zambia.

Marketing features	Game Ranch	Communal Area
Payment procedures	At the hunting area by the client himself	Far from hunting area, revenue returned to community months later by an intermediary
	Payment after animal is hunted	Prepayment required
	Licenses not required	Licenses required
	No concession fee	Concession fee required
	Client cost per animal low	Client cost per animal high
Product flexibility	Hunts tailored to clients needs	Fixed categories of hunts, limited to two types: classical and mini safaris
	Species not restricted	Certain species restricted to classical safaris
	Cost based on species price + daily rate	Cost based on species price + daily rate + concession fee
Management commitment	Management of resource rewarded by high valued products	Disincentive to manage resources, subsidizes lower valued products
	Management directed by single land owner with total control	Government and community co-manage wildlife with limited control by community
	Minimum conflict with other land uses	Land uses that interfere with safari hunts common
	Primary income source	Supplementary income source
Operations management	Safari operator is owner of ranch	Operator non-resident of area, often with multiple partners with unclear responsibility or accountability
	Safari operator has indefinite tenure for running industry	Short-term tenure for running industry in hunting area
Wildlife ownership rights	Private ownership	State ownership, limited user rights defined for community
	Wildlife producer full beneficiary	Wildlife producer a shared beneficiary with questionable sense of ownership
Biophysical characteristics	Hunting area 50-100 km <sup>2</sup>	Hunting area 1000 km <sup>2</sup> +
	No. species relatively low	Higher species numbers

	Large predators often absent	Large predators usually present
Client appeal	Greater flexibility in what and how to hunt	Greater Government regulations on what and how to hunt
	Less expensive	More expensive
	Higher certainty of hunting success	Lower certainty of hunting success due to conflicts with non-resident hunters, special licenses, fishermen, etc.
	Exclusive hunting rights	Hunting vulnerable to disturbances
	Less paperwork	More paperwork

Several important conclusions can be drawn from the comparison in the above table. 1) Game ranches have a distinct advantage over communal safari hunting areas in terms of pricing, product flexibility, product quality, and control over land use disturbances, 2) Because of the relatively larger area with more species variety, communal safari hunting areas represent a many-fold greater potential for revenue generation than game ranches, 3) Non-enforced management controls, vague ownership rights and Government support of non-safari hunter licenses in safari hunting areas contribute to static income and a sluggish expansion of the safari industry operating on communal lands.

Table 2 below provide a summary of client perceptions for 71 clients interviewed by using a confidential questionnaire to assess their hunting experience on communal safari hunting areas in 1998.

Positive perceptions of safari hunting experience (%, sample = 71 clients)						
Animal abundance	Trophy quality	Hunting area	Professional hunter	Hunting Camp		
39%	32%	37%	90%	85%		
Negative perception of safari hunting experience (%, same sample)						
Land use activities:						
Fishermen disturbance	Bush fires	Snares found	Poaching activity	Other licensed hunters	Tree cutting	Village encroachments
15%	17%	32%	39%	21%	25%	35%
Safari products:						
Too few animals	Poor trophy quality	Poor camp	Poor vehicle	High fees		
13%	6%	3%	0%	23%		

Results from Tables 2 provide some striking insights into the current problem of maintaining quality of safari products in Zambia. In terms of animal abundance and trophy quality, only 39% and 32%, respectively, of the clients interviewed scored their hunting area as being noteworthy or outstanding. Of the same sample, 13% and 6% felt that animal abundance and trophy quality, respectively, were poor. In other word, only about a third of the clients who come to Zambia will be truly impressed with wildlife numbers and their trophy quality in the communal safari hunting areas. Also revealing from these results was the strikingly high percentages given for various land use disturbances that clients said distracted from their hunt and lowered the overall quality of the product. Finally, 23% of the clients felt license fees were over-priced. One would conclude from these results, that Zambia's percentage of

likely returning clients to Zambia would be no higher than about 60%, and most likely considerably lower.

### **Safari hunting analysis: factors constraining growth**

This section presents those variables recognized by the stakeholders as being the most threats in influencing the economic success of Zambia's safari hunting industry. An analysis of each identifies how their contribution to the industry may be constrained by current policies and regulations.

#### **a. Setting and regulating sustainable quotas**

The safari hunting quota represents the largest number of quality trophy animals for each available species that can be successfully hunted in a hunting area without reducing their numbers in subsequent years. Technically sound information is necessary to guide the determination of a quota that includes not just animals allocated to safari clients but also to other licensed hunters allowed under Zambian Law.

National Parks and Wildlife Service and the Ministry of Tourism have historically controlled the setting and regulation of quotas. Unfortunately, numerous problems do occur, largely over lack of controls. Some progress is being made to divest quota setting responsibility to local community authorities, but much of this progress has been undermined by problems in how the quota is regulated and licensed. Having most of the regulatory controls centralized in Lusaka could be a major weakness if such a location made these controls difficult to enforce due to political pressures or influence by special interest groups. The advantages probably outweigh the risks, however, as a single location creates a much easier way for centralizing licensing data, offering a convenient place for the commercial sector to purchase licenses, and having easy access by NPWS officers charged with the responsibility to maintain regulatory controls.

Despite these advantages there have been serious infractions of management controls controlling quotas and the way licenses are issued in recent years. Table 4 presents the key problems of setting and regulating quotas in 1998.

Category		Problem	Consequence
Special licenses			
	a. Hippo cull	Poor controls, increased disturbance levels	Clients perceive Zambia negatively, cancelled hunts
	b. Key species	1. Wildlife hunted at anytime on special license 2. Species affected are prime economic ones	Increased disturbances to safari hunts Significant loss of revenue, lowered trophy quality for clients
Licensing			
	a. Excess non-resident hunters	1. Competition for same animals and hunting areas	Significant loss of revenue, lowered trophy quality for clients
	b. Key species given to non-residents at subsidized prices	2. Clients feel cheated, community perceives income loss	Lowered competitiveness for Zambia's safari industry, community less committed to resource
Quota controls			



a. Quota changed to satisfy public pressure	1. Over-hunting	Lowered hunting success, unfavorable publicity for Zambia
b. Controls not followed	2. Sensitive species not protected	Species eventually removed from quota, loss earnings for area

Informed decisions on quota setting can be made from accurate monitoring results that define such statistics as trophy size, hunting effort and hunting success. Though these variables are now being collected and used for quota setting, margins of error still exist that need to be recognized. For certain low density species or for any species when population declines are suspected, the precautionary principle needs to be rigorously applied to avoid population declines that necessitate the removal of the species from the safari quota and thus from opportunities to earn income for the wildlife producer. Regrettably, there are numerous examples where this was not the case, resulting in fewer species on quota and lowered income for the industry. In Luangwa Valley, for example, there are numerous instances where roan, waterbuck, eland, hartebeest and wildebeest were removed from quota. Had the precautionary principle been applied, a much more conservative set of rules might have been adopted. For one, they would not have been offered to non-residents, two, they would have been more rigorously monitored to track population numbers, and three such data would have been used to set safari quotas to complement hunting statistics.

#### b. Maximize use of quota, improving trophy quality

To a certain extent, the quota defines the economic limits for what a hunting area can generate in a given year. In practice, however, there are numerous factors that influence the percentage use of a quota, often in complex ways. As a result, Zambia's current policy of requiring a 75% use of the prescribed quota for a safari concession may not be justified or appropriate. One undesirable effect this policy may be causing is the pressure it places on professional hunters to encourage clients to shoot lower quality trophies in order to meet the percentage requirement imposed by Government. As a result, trophy quality for some species may decline as more young males are harvested. In such a situation, the quota of trophy animals for that species is set too high and over-hunting of young males results in further decline in the species. A downward decline in the species thus continues.

Under normal circumstances, the industry should be self-driven for profit to fully utilize the quota while maintaining or even improving trophy quality. Prerequisites for achieving such results include: 1) quotas are set correctly, 2) illegal off-take of animals or unusual mortality from natural causes are factored in correctly, 3) quotas once set are not increased by pressures from user groups, and 4) management controls are rigorously enforced.

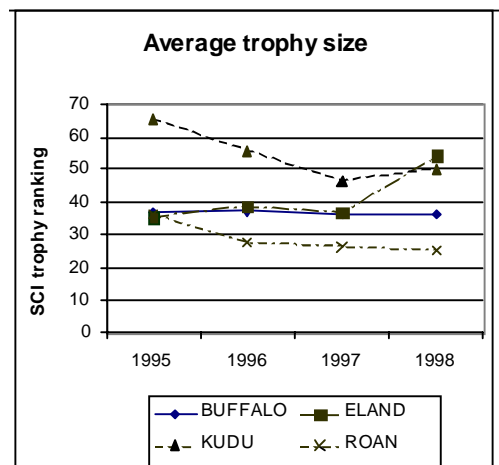
A review of the factors that may be contributing to a reduced percentage use of quota is presented below to help recognize the current weaknesses in how hunting quotas are being set and administered in Zambia as well as other factors that might be contributing to low use of safari hunting quotas.

Problem	Common Cause
a. quotas set too high	quota setting procedure flawed, lack stakeholder involvement
b. land use disturbances contribute	resident community not supportive

- to unsuccessful hunts
- c. under-use of a hunting area
- d. excessive disturbances from other licensed hunters in area
- e. poor guiding skills by professional hunter (PH)
- f. restrictive policies that prevent or discourage a client from hunting a second animal of the same species
- g. no incentive to improve trophy quality

of industry or face needs that outweigh benefits from safari hunting  
 lack of investment or planning in hunting road construction, poorly run safari company, area not well surveyed  
 inadequate controls and regulations, quotas compete with animals sought after by safari clients, safari hunting not given priority over non-commercial hunting which earns far less income  
 lack of experience in area, operator does not maintain a resident PH  
 flawed regulations that interfere with the marketing of hunts and animals  
 lease period too short, poaching levels too high to expect high survival of large male animals, hence investor unwilling to commit finances to improve area

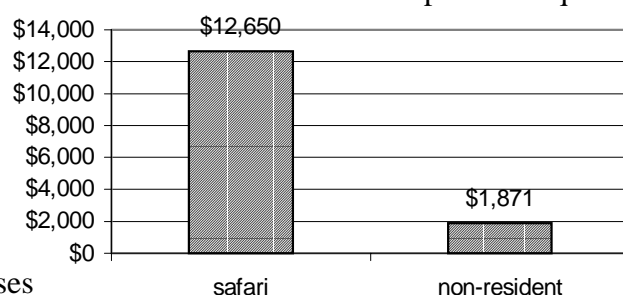
To a lesser or greater degree, all of the above factors constrain quota use by safari clients or influence trophy quality throughout the safari industry in Zambia. In recent years percentage of safari quota use have averaged about 40-50% while trophy quality has remained generally static, as shown in the figure to the right.



### c. Maximize value of quota for producers and investors

Those who produce wildlife, the local community, and those who market the resource and provide services needed by safari clients will only be compelled to promote growth in the industry if they are able to maximize the value of the products they produce or sell. This point is absolutely fundamental and is closely linked to policies supporting the business of producing and selling wildlife. The following examples illustrate ways current policies are actually reducing growth:

The figure to the right illustrates the large disparity between license fees for animals harvested by safari clients and non-resident Zambian-based hunters for 23 species on quota (only 11 species offered to residents at approx. 20% of non-resident price). Based on quotas averaged for all game management areas where these three forms of hunting take place, safari hunting accounts for only about 40% of the total animals harvested (the actual percentage is considerably smaller when special licenses



and animals added to quotas are included).

Table 4 below illustrates the income difference if all animals were rated at safari client prices versus their respective price list. This comparison was done for a sub-sample of six areas: Chanjuzi, Mwanya, Luawata, Nyampala, Chifunda, and Chikw, based on the 1998 quotas:

	Number on quota	\$ value rated at safari price	value at list price	Dollar difference
Safari clients:	739	\$370,400	\$370,000	\$0
Non-residents:	372	\$144,150	\$12,575	\$131,575
Residents:	384	\$125050	\$2,151	<u>\$122,898</u>
			Difference:	\$254,473

As a result, local communities are being asked to produce and subsidize wildlife for non-residents at a potential loss of \$131,575 (or approx. \$22,000 per area). This literally means the producer is losing approximately 90% of the commercial value of the harvested resource, which is a strong disincentive to produce wildlife on their land. Furthermore, it also reduces the amount of funds that are available to pay for the management costs of the resource, since communities are now financing their own village scouts and field operations under the ADMADE policy.

Table 5 below lists the gazetted prices of selected animals that are currently sold to the public and most favored by safari clients.

Species name	safari	non-resident	resident
Buffalo	\$1,000	\$80	\$40
Bushbuck	\$300	\$16	\$8
Crocodile	\$750	\$60	
Eland	\$1,100	\$400	
Hartebeest	\$600	\$30	\$15
Impala	\$100	\$20	\$2
Kudu	\$1,000	\$128	
Leopard	\$1,500	\$400	
Lion	\$2,000	\$480	
Puku	\$300	\$20	\$2
Reedbuck	\$300	\$16	\$2
Warthog	\$300	\$20	\$3
Wildebeest	\$650	\$40	
WildebeestC	\$600	\$40	
Zebra	\$500	\$60	

Key points are made in reference to this table that underscore the potential risk that fixed species prices have on reducing the value of a quota:

Non-resident hunters do compete for the same animals hunted by safari clients, and as already seen, pay far less at an appreciable cost to the producer, the community. The view that non-resident hunters hunt only for meat and do not select trophy animals is unfounded. Data from Mwanya, Mulobezi, Luano, and Lunga Lushwishi (the four areas where these data were collected) show that non-residents who hunt in the same areas as safari clients take almost exclusively male animals. For these four areas,

percentage of harvest that were male animals were 80%, 100%, 100% and 90%, respectively.

Competition is not just for animals as the limited hunting areas have to physically accommodate both classes of hunters, each with their own vehicles. The consequence of this competition on safari product quality can be catastrophic for the industry. Luawata area in 1999 cancelled their hunts to avoid disappointing their clients. This represented a loss of over \$40,000 in license and concession fees. In another area, the disturbance from non-resident hunters was so great that a client threatened to sue the operator for failing to conduct the hunt he had paid for.

Several variables need to be considered if this source of competition and loss of income and product quality is to be avoided:

- 1) total animals on non-resident quota
- 2) price list for prime species hunted by non-residents, and
- 3) non-resident hunting restriction to avoid overlap with safari clients.

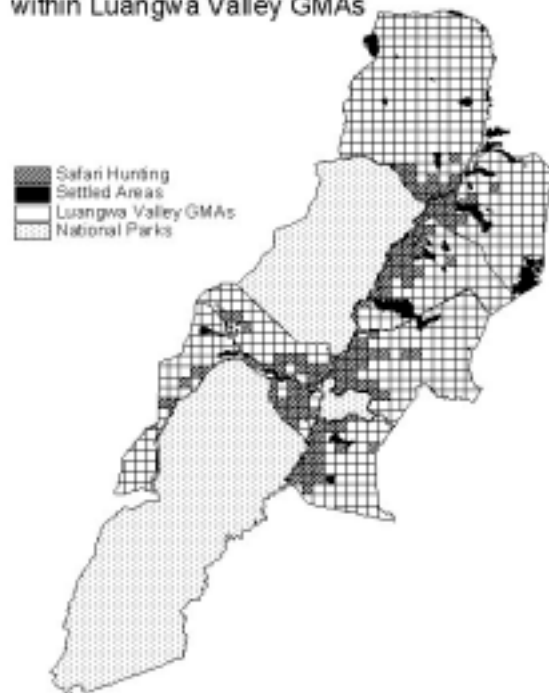
*(Note: In the White Mountain Apache Reservation of the southwest USA, local Native American authorities have intensively managed their wild elk populations for trophy size to increase the market value of elk sport hunting. Today, their elk population has the distinction of sustaining the largest trophy animals than any other elk population in the lower 48 States. Their commercial value to the reservation has risen steadily with a current value of \$12,000 per animal. In 1997, the total income from fishing and hunting revenues for this one reservation exceeded \$1 million and the reservation is one of the best protected and managed hunting areas in North America.)*

d. Optimum size of hunting areas, under-used areas, and non-tendered areas

1) Existing hunting blocks

Another important variable influencing total revenues and potential growth of Zambia's safari industry is the effective area a single professional hunter can hunt and how well this area corresponds to what is available to him. The figure to the right shows the 5 km<sup>2</sup> grids trophies animals were harvested by clients for six safari concessions in Luangwa Valley for 1997. On average, only 18% of the total area of each hunting block concessioned to operators was used to obtain trophies for safari clients. Settled areas, lands that have been cleared for settlements or farming, account for only 6% of these same areas. This shows that significant portions of concession areas were not being used to generate safari revenues.

Land area used for safari hunting within Luangwa Valley GMAs



The above figure also suggests that operators tended to capitalize on those areas having the greatest access, and the highest known wildlife concentrations. This makes good business sense for the short-term, as it lowers their costs and minimizes risk. As a result, the underused portions of the concession become more vulnerable to poaching and consequently become less viable for safari hunting, thus lowering the revenue potential for these concessions.

The key question that needs to be asked is whether the actual area viable to safari hunting is shrinking, and if so, does this suggest a diminishing safari industry? There is a general consensus within the industry and in particular among the professional hunters who have a historical experience with these areas that the answer is yes. If we assume this is correct, despite a relatively constant revenue stream from the industry over the past five years, additional questions need to be raised. Are management policies regulating the industry and influencing the management of the resource contributing to this trend? Are the operators themselves to be blamed for not committing more resources to the hunting areas? Attributing cause and effect to this trend is almost certainly an effect of multiple causes. With varying degrees of influence among the different concession areas, the following variables are likely to be contributing to this trend:

- 1) experience in the industry by operators
- 2) duration of lease period
- 3) Government ability to enforce compliance of lease agreement
- 4) investment capital among operators
- 5) co-management relationship between operator and resident community
- 6) poaching pressures
- 7) community leadership and skills in resource management

## 2) Hunting blocks not leased and cost of rehabilitation

Since 1993, a total of 11 additional GMAs (6) or new areas seeking GMA status (5), covering almost 116,000 km<sup>2</sup>, have contacted NPWS to request that they be incorporated into the ADMADE program. This would increase the size of ADMADE by nearly 50%, from 10 to 15 GMAs. Of these 11 areas only four host safari hunters and all of these are generating only marginal revenues. This suggests that unlike most of the original ADMADE GMAs, these new areas may be rather depleted of wildlife.

Given the right conditions, these areas could, however, recover their wildlife and begin to generate safari hunting revenues comparable to the more successful, longer established ADMADE GMAs. Assuming that start-up financing for these new GMAs can be secured for 3-4 years to allow wildlife populations to recover, and appropriate partnerships established between communities and safari operators, inclusion of these new GMAs into ADMADE has the potential of adding significantly to the total revenues from safari hunting.

The current use of trophy animals to sustain the safari industry is limited to 19 hunting blocks, of which 14 account for 90% of the total income. Of these, twelve received an initial investment of wildlife management equipment (radios, vehicle, tractor, office equipment, and tenting) and staff training by a donor (USAID), and are now able to pay for basic resource management capital equipment needs from safari hunting revenues alone. This reinvestment approach has become a fundamental basis for how ADMADE partners with the private sector to support wildlife management in Zambia.

The other five areas with two exceptions have not received any start-up investment. None of these areas have been able to build up its safari revenues sufficient to buy or maintain the equipment needed to manage its wildlife populations. When ADMADE was established in 1988, initial investment capital could not be found for ten of the GMAs included in the program. Of these, four are no longer able to support a viable safari industry, and four are in the bottom 10% of ADMADE revenue earners.

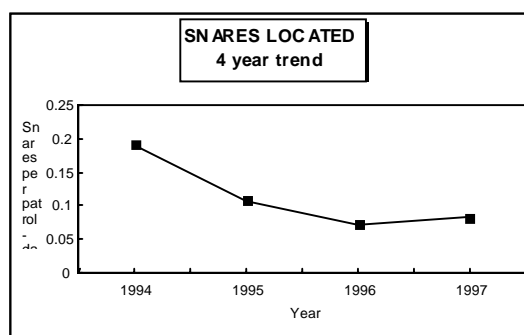
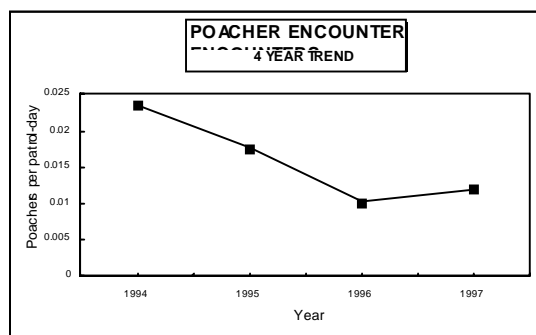
#### e. Co-management of resource

Resource use can be sustainable only if management enforces the necessary regulations and controls that allow the resource to renew itself. In reality, this becomes extremely difficult for large land areas having borders that are open to people who may wish to violate such regulations. This situation currently plagues most safari hunting areas in Zambia. Typically they include the import of wires for snaring wildlife, movement of people from adjacent areas into a safari area in search of fish, game meat, honey and other natural products, and uncontrolled fires set by poachers and honey gatherers who venture into the hunting area.

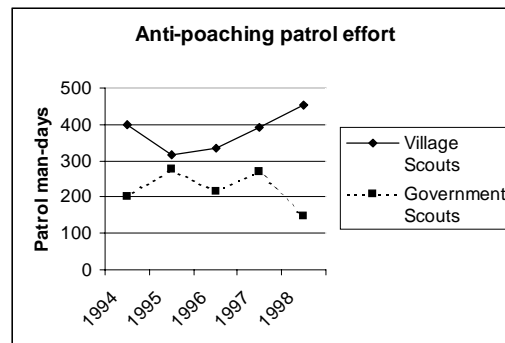
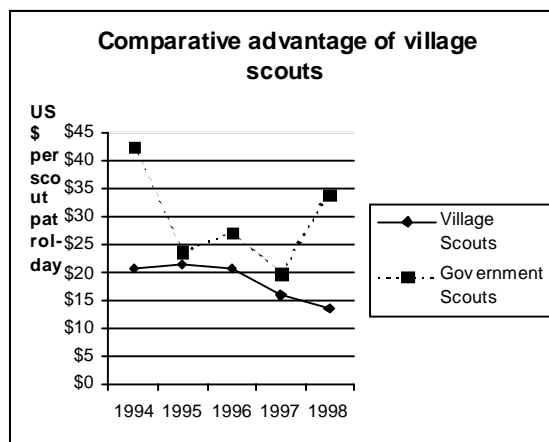
The history of wildlife management in Zambia has shown that neither Government nor the private sector has the resources to prevent these forms of resource degradation or the loss of wealth that results from it. For this basic reason, co-management of the resource with the local community is perhaps the only way that wildlife can be sustained to support the safari industry in Zambia.

Preliminary analysis of ADMADE results reveals some striking lessons about the cost-effectiveness of managing the wildlife base through community leadership and local involvement. It can be argued that such results would have been even more striking had more operators and their PHs been committed to working in partnership with local communities. It can also be argued that a low financial return to communities for co-managing wildlife resources due to delayed payments and low percentage return from revenues earned has lowered the potential benefits of management efforts by local communities.

While problems of snaring and poaching continue to disturb safari hunts, the overall trend of their occurrence is declining when data from all ADMADE units are averaged together (shown in the figures below). This is particularly significant for snares since this can only be controlled by the collective cooperation of local residents themselves. These results have been corroborated from a small sample of Professional Hunters who are hunting in ADMADE areas.



Complementing the overall role of the community is the local workforce of village scouts. Their role is to apprehend those who violate the law and to help communities enforce their own set of controls to reduce land use disturbances.



Village scouts represent a significant source of labor that is community-employed, locally based and managed, and directly contributes to wildlife production. As shown in the figure above, when compared with civil servant scouts, ADMADE village scouts offer a comparative advantage. By averaging data across all GMAs from 1994-1998, results show that using village scouts increases the number of anti-poacher patrol days from 2-3 fold such that effort, on average, rises from 223 regular scout patrol-days to 323 village scout patrol-days per year per GMA. As work effort per scout is comparable for village and regular scouts, the increase in total anti-poaching effort is largely a consequence of there being twice as many village scouts per GMA (mean = 17) as there are regular scouts (mean = 7). Furthermore, they are far more affordable, costing 2 to 3 times less than a village scout. This difference is even greater when considering the additional support costs for civil servants (funeral allowance, travel time to town to collect salaries, housing requirements, etc.) Despite these apparent improvements, data also suggests that village scout performance is well below levels of what should be expected. There is considerable documentation that financial support from community earnings often arrive too late to be effectively used to support operations and that management expenditures have not been well controlled.

While illegal activities on average may be declining, the level of land use disturbances continues to undermine the quality of safari products. With increasing human pressures on the remaining hunting areas, resolving this problem is perhaps the greatest challenge the industry faces.

Far from being simple, one solution appears to be community leadership. On multiple occasions local leadership has proven indispensable in resolving difficult land use issues like village expansion into important wildlife areas. Table 5 below illustrates examples of past actions that have been taken. Not all cases listed below have been successfully carried out, but this has been due almost entirely to lack of funds for the community to support the relocation costs of the people involved.

Unit	Problem	Community Action
Sichifulo	Approximately 80 household settled in Katanda area, competing with wildlife for critical water resources and habitat	Community leadership convened a meeting where residents agreed that all households be relocated elsewhere in the area

Mumbwa	Illegal settlers from outside the GMA cleared a large section of the land used for safari hunting	The community decided to fight this threat to their safari industry and won a court hearing
Mwanya	Village encroachment into the safari hunting area	The local community decided to halt any new farming sites in the area that conflict with safari hunting
Chanjuzi	Village encroachment onto the Chipuku Plains which is a prime safari hunting area for a number of key species	The entire community resolved that by 1998 no settlements would be allowed in this area. Households were relocated, and houses in encroachment areas were destroyed, on schedule and as demanded by the community to protect their safari industry.
Munyamadzi	Village encroachment along an important wildlife corridor and water access.	The community used financial resources from ADMADE and from Irish Aid to create better conditions for settlements in an alternative area without wildlife conflicts
Chikwa	Settlements near waterholes used by wildlife	Households relocated as was recommended in the community developed land use plan

Despite the strong arguments and compelling examples to work with communities as partners, safari operators have generally been slow to recognize and fully exploit the potential economic benefits of such co-management relationships with the community. In an ideal situation, both the operator and the local community would interact regularly as working partners in the industry. Each other's needs would be understood to facilitate effective working relationships and to promote the quality of safari products needed to make their business profitable and competitive. Instead, distrust and disharmony are the norm, resulting in reluctance to engage in frequent dialogue to help resolve land use conflicts that undermine the industry.

Government has played a key role in helping foster this co-management in the various ways:

1. Establishment of a village scout local workforce (500+) to police safari areas and improve community awareness about the industry
2. Training and deployment of specially trained NPWS officers (Unit and Deputy Unit Leaders) to promote community leadership in wildlife management
3. Reorganization of community leadership structures to become more democratic and better qualified to work as partners with the private sector
4. Facilitate the creation of community-based land use plans through dialogue with safari operators to help resolve land use conflicts
5. Train local leaders in quota-setting skills.
6. Training and establishment of community-based book-keepers to facilitate transfer and accounting of revenues earned and used by the community

In addition, National Parks and Wildlife Service has instituted a special awards program that serves as a certification process for recognizing those safari operators who meet basic criteria that promote cooperation with the local community. Finally, it has ushered in new legislation to support increased benefits and responsibilities for communities to co-manage wildlife. While most of these initiatives have been the result of ADMADE, it can be fairly said that they are still in a stage of being implemented with many results yet to be demonstrated.



Government's most important role, perhaps, will be to ensure the process continues to fulfill the real promises of community-based resource management to the safari industry.

f. Restrictions of species on quota

In certain situations species normally hunted are removed from quota as a necessary step to enable populations to recover from possible effects of over-hunting, poaching, disease outbreaks, or other such problems. These restrictions remain in place until evidence warrants legalized hunting to resume. Such restrictions are obviously justified to protect populations to sustain hunting quotas. The decision to make such restrictions are ultimately invested in the powers of the Government, although in recent years requests for such decisions have come from both the community and the private sector and Government in most cases have complied.

One key economic species that has been restricted for nearly two decades is the elephant. Its restriction was initially made because of its dramatic decline in numbers, caused almost exclusively by poaching. Over the ensuing 20 years, elephant numbers have increased and are now approaching 25,000 nation-wide (Mwima, unpub. data). The restriction of elephants on hunting quota is no longer based on total numbers but on other aspects that deal primarily with the international sensitivity of utilizing this species commercially. This section weighs the cost and benefits of maintaining this restriction and analyses the potential impact reintroduction of elephant could have on the safari hunting industry.

As a charismatic species that claims a high profile internationally, elephant protection should certainly be a priority before any hunting is introduced, but there are other considerations. Zambia has demonstrated a capacity to protect elephants throughout much of their range, particularly in the Luangwa Valley and parts of the Lower Zambezi and areas surrounding the Kafue National Park, where elephant numbers are increasing. As elephant numbers increase, so too does the scale of conflict with humans. When this happens, and if elephants are not contributing any added income to the community through legal uses, the pendulum of local attitudes will likely shift toward illegal hunting. In many areas of Luangwa Valley human conflicts with elephants have reached unprecedented levels, contributing to increased number of human fatality and loss of crops. In Mwanya and Munyamadzi units, for instance, there have been nine human fatalities caused by elephants since 1995 with numerous cases of human injuries. Some villages have abandoned their farms and settled elsewhere at considerable cost to individual households. Approximately 30% of the households in Chief Malama's area in Lower Lupande have shifted elsewhere because of crop damage caused by elephants and people of Mukasanga Village in Mwanya area have given up farming their traditional fields because of elephants.

Can communities be asked to keep elephants on their lands when the costs of doing so are so high, and benefits, so wanting? In 1998 elephant poaching in Luangwa Valley increased dramatically where levels had remained low in recent past years (Lupande area, approx. 8, Mwanya area, 4, Chanjuzi, 3, and West Petauke, 6). Rather than promoting uses that might enhance the value of elephants to provide community incentives to tolerate a certain level of crop damage, Government is having to kill as many as 20 elephants annually for crop damage control without generating any added commercial value to the community or the nation.

Wealthier nations with their strong anti-hunting lobbies advocate elephant preservation values that poorer nations can ill-afford. Yet, their advocacy has a bearing on hunting policies in Africa and ultimately the ability to conserve elephants. Such policies that deny sustainable economic benefits from elephants may ultimately invite a far greater harm to elephants through illegal hunting and conversion of elephant habitat to farmland.

In contrast to the Zambian situation, elephant trophy hunting is the most lucrative and profitable form of safari hunting in Africa. It is being successfully managed in many range States (Namibia, South Africa, Zimbabwe, Botswana, and Tanzania) with individual license fees varying from \$8000 to \$12000 per animal. Zimbabwe alone hunts approximately 350 elephants on safari annually and meat benefits are provided to local communities as an added but significant value to the local economy.

The total price tag for an elephant hunt with all services and fees combined could contribute anywhere from \$25,000 to \$50,000 per animal to the Zambian industry. Given these figures and the risk of losing local community support for wildlife as a land use from rising costs of living with elephants, it would be a mistake for Government not to review its policy toward elephant hunting.

#### g. Licensing and fee payments

Licensing and mode of fee payments are procedures that can greatly influence the bureaucratic hurdles the industry must contend to market safari products. They can also alter the perception of resource ownership by the producer community. Furthermore, if these procedures are flawed, the quality of the product can suffer. Given that these procedures have remained static for the past decade while drawing considerable criticism from both the industry and the community in recent years, it is appropriate they be carefully analyzed.

Currently all licensing of safari hunts (excluding Lupande GMA) are conducted at NPWS HQ at Chilanga where operators are required to purchase unendorsed supplementary animal licenses for every animal the company expects the client to hunt. This form of pre-payment by the operator has several implications:

- a. Operator assumes financial liability for these licenses should clients not find the desired trophy animal. This has resulted in many operators requiring clients to buy their animals prior to the hunt, irregardless of whether the animals are successfully hunted.
- b. The pre-payment of licenses by operators increases the likelihood that PHs under the instruction of their company owners will influence clients to hunt sub-quality trophy animals to lessen the risk that licenses be unused.
- c. Operators will often not purchase a license for a given species the client did not request. If while hunting, the client changes his mind and wants to hunt this species, the client will be unable to do so. This results in loss of revenue and dissatisfaction by the client.
- d. Operators must coordinate the delivery of licenses to the safari camp and this is often unreliable.
- e. Clients are discouraged from hunting second animals by paying 1.5 times the price of the second animal. For some species, a second animal is not allowed. This procedure reduces the full use of the quota and restricts the operator from

- packaging his hunts to meet the needs of the client. Again, the result is lost revenue.
- f. Transactions of license sales are done far away from the community and as a result the perception of resource ownership by the community is greatly reduced.
  - g. Transfer of funds to the community depends on Chilanga transferring community shares to community accounts. Past years have shown that first payments often do not come until August and subsequent payments are delayed for various bureaucratic reasons. As a result, the community is left with little time to finance and implement their community projects, which in turn undermines the effectiveness of ADMADE.
  - h. The procedures exclude the community from any legitimate role in participating in the transaction of licensing and this has further reduced community confidence and trust in the industry as a direct benefit to local residents.
  - i. The procedure creates problem for managing the use of licenses, since operators frequently exchange a license for one animal not hunted for additional species equivalent to the cost of the first species. Documentation of these changes are impossible to track, leading to considerable confusion over claims that animals were hunted without proper licenses.

*The crux of the problem facing licensing procedures and mode of payment is that the private sector is able to charge for its services but the community is not. The key service provided by the community is production and protection of trophy animals. Specifically, this is done by year-round patrolling by village scouts, allocating areas of their land to disturbance free hunting by safari clients, accepting the various costs of living with wildlife, providing skilled manpower to assist with the hunting (trackers, village scouts), and improving community education about the industry. If these services were paid for in a more direct and transparent way by allowing the community to collect the fees they are entitled to, then these services would be more rigorously provided. As a result, all the beneficiaries of the industry, including Government, would increase their earnings.*

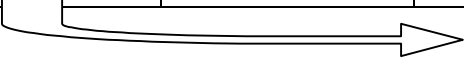
Valid reasons exist that make it impossible to collect revenue directly from within the hunting area (e.g., regulations by Ministry of Finance for collection of public funds, client's unwillingness to travel with large sums of money to the hunting area, etc.). However, the problem of how to satisfy community perceptions that revenues collected are theirs, are fully accounted for, and can be obtained on demand to meet their community needs continues to erode community commitment to this industry.

#### h. Company owners

Safari company ownership has an important bearing on its capacity to reinvest profits into the hunting area or in ways to increase the effectiveness of their community partners. If a company has more than one owner, then profit shares will be divided according to their respective shares of ownership. The important questions to such situations are 1) Whether the different owners are actually contributing to the quality of their products and the growth of their business?, and 2) Is the company able to reinvest in the area with the cost of supporting multiple owners? The distinction between multiple owners, company manager, and sub-contracted company are largely semantics: the bottom line is that company profits are shared with more people and presumably there is less profits available to support product quality and business expansion. Hence the industry suffers and the resource erodes.

This problem does exist in Zambia's safari industry and is linked to what criteria and procedures are used for tendering an area to a registered company. Past performance is perhaps one of the best measures that can be used. The Conservation Bullet Awards represents a quantifiable measure of those standards that can demonstrate co-management with the local community. Those companies able to reinvest in their hunting area in such ways as creating water holes for wildlife, wells to reduce human-wildlife conflicts at shared water holes, road improvement for improved access, and so forth are more likely to be those companies having less overhead supporting multiple partners.

Companies that insist on multiple partners will likely fail to reach these standards if they have less profit to reinvest in the area. Government's role should be to intensify efforts to improve company selection on the basis of these standards because of the improved revenues that will result from it. This point is clearly demonstrated from the results of the Conservation Bullets awarded for 1998, illustrated in the Table below. Excluding Luawata due to a special problem causing the company to cancel hunts early in the season, income for Conservation Bullet recipients increased by 16% from earnings in 1997. In contrast, non-recipients actually lost income by 11%.

Hunting block	Status	1997	1998	Difference
Bilili-Nkala	Distinction	\$40,940.00	\$60,350.00	\$19,410.00
Lunga-Busanga	Distinction	\$31,765.00	\$29,550.00	(\$2,215.00)
Mwanya	Distinction	\$60,950.00	\$65,575.00	\$4,625.00
Luwawata	Certified	\$102,950.00	\$60,000.00	(\$42,950.00)
		 <div data-bbox="758 1019 1220 1086">                     Stopped hunting early in 1998 due to interference with non-resident hunters                 </div>		
Mumbwa-West	Certified	\$60,600.00	\$61,350.00	\$750.00
Nyampala	Certified	\$72,155.00	\$73,660.00	\$1,505.00
Lunga-Luswishi	Certified	\$44,020.00	\$60,400.00	\$16,380.00
West Petauke	Certified	\$45,807.50	\$60,750.00	\$14,942.50
Chanjuzi	Non-recipient	\$73,625.00	\$72,625.00	(\$1,000.00)
Chifunda	Non-recipient	\$84,550.00	\$51,400.00	(\$33,150.00)
Chikwa-Fulaza	Non-recipient	\$89,630.00	\$53,700.00	(\$35,930.00)
Kasonso	Non-recipient	\$38,425.00	\$69,380.00	\$30,955.00
West Zambezi	Non-recipient	\$38,175.00	\$41,875.00	\$3,700.00
Mulobezi	Non-recipient	\$91,620.00	\$79,925.00	(\$11,695.00)
Rufunsa	Non-recipient	\$26,880.00	\$47,275.00	\$20,395.00
Sichifulo	Non-recipient	\$91,230.00	\$60,585.00	(\$30,645.00)

Government has the critical responsibility of using such information for choosing those operators who will help play an active role in developing the industry for Zambia. In addition, Government has the authority to enforce the terms of lease agreements signed by the operators. Such pressures of compliance by Government can be an important basis for excluding those operators without the required liquidity or experience to enter into the industry. At one public meeting attended by local leaders for a particular hunting area, the owner of the company leased to that area confessed he had no knowledge of what commitments he had made in the lease. He further explained that he never intended to fulfill his obligations as this was a common practice by many operators. The community leaders expressed dismay and disappointment by this attitude until the operator had to apologize. Such complacency can only be allowed to exist if Government allows it.

Company commitment to a concession area will also be dependent on what conditions he is allowed to hunt and manage his concession. If competing hunting interests are allowed to compete for the same trophy animals without satisfactory controls, then certainly, private sector investments will be minimal. For such reasons, Government has the important responsibility for developing the necessary conditions that will encourage investments and management contracts by the operator to develop safari concessions into a more profitable business for all stakeholders.

#### i. Professional hunters

##### 1) Standards

In many respects the professional hunter or PH is the most critical person to the success of the industry, particularly from the viewpoint of the client. This is because the client puts most if not all of his trust in the PH to find trophy animals, provide services expected at camp, and supply any other back-up needs as may be required. The profession is dangerous, demands long hours, and is physically taxing. Currently, there exists a Professional Hunters Association of Zambia (PHAZ) whose main task is to represent the needs of PHs and to help maintain a high standard for the profession. Unfortunately, law does not require PHs to be a member of the Association, and therefore, non-members need not conform to the high standards the Association requires. As a result, those PHs who are not members of PHAZ cannot be barred from hunting in Zambia.

If companies are unable to pay the services of a qualified professional hunter, they are more apt to cut costs and hire the services of someone not certified by the Association at a lower cost. In most cases this leads to poor services and disgruntled clients, who may report their disappointments to well-read sporting publications. From the standpoint of maintaining stability and competitiveness in the industry, having highly qualified PHs in Zambia should be a major objective for the industry. Perhaps just as important is the need for these PHs to be permanently based in a hunting area. This ensures the full benefit of their knowledge about the industry and ways to improve product quality can be effectively communicated to their community partners while also providing better service to the client.

#### Categories

A limitation to the number of animals that can be hunted on a safari quota is the number of clients a single PH can guide in a season. Beyond this upper limit, hunts may have to be delayed to subsequent years. What is not well known or perhaps appreciated is the possibility that some clients may be interested in hunting non-dangerous plains species, and such cases the costly services of fully licensed PH may not be required. In such cases, Zambia's safari industry could find a very important niche for the beginner PH who could also be a local resident, perhaps a well experienced village scouts or reformed ex-poacher from the same area. Such an arrangement would create flexibility for the operator to market more animals and to possibly cultivate a unique product for Zambia by offering a more "African Culture" hunt. Under the supervision of the resident PH, the local trainee PH would develop some of the necessary skills and services required of by clients.

### 3) Redefining the image of a PH

Zambia has an exciting opportunity of creating and marketing a special image of what Zambia's PHs stand for that could significantly enhance the industry's competitive advantage and prestige in the global market. While the professional services of guiding, protecting clients and offering high camp standards rank at the top of the list, other attributes that Zambian certified PHs need to be recognized for and made prominent are:

- a) professional commitment to conservation
- b) facilitators of community involvement in wildlife management
- c) spokespeople for the ADMADE program to ensure clients fully appreciate the policies that link safari hunting to conservation and rural development.

Redefining this image of the PH cannot be achieved simply by words but will have to be demonstrated with tangible evidence combined with effective marketing techniques. This decision is one that can only be made with the full support of the professional hunters themselves and their willingness to make the effort to distinguish themselves from PHs in other countries. Furthermore, the image requires a unified one for all PHs if the image is to attract clients to Zambia, suggesting that PHAZ and Government should be fully committed to promoting PH standards in Zambia. Specifically, this means those PHs, who cannot meet the standards in helping create the image Zambia is trying to portray, should not be licensed as a hunting guide in Zambia.

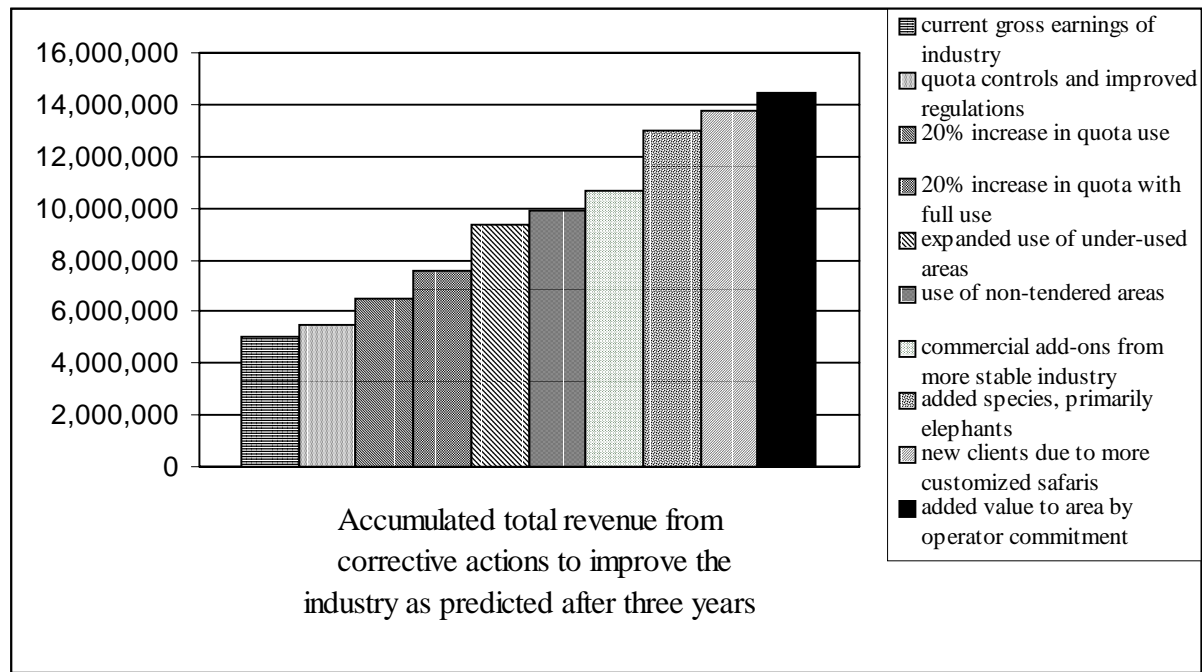
### **Market analysis: enhancing competitive advantage and financial projections**

The key conclusion that might be drawn from the results of the previous section is the almost "do or die" need for the safari hunting industry to secure a clear and unmistakable competitive advantage for safari clients to hunt in Zambia as opposed to hunting elsewhere in Africa. This means resolving the host of problems and constraints under which the industry now operates. This will only be possible if all parties the industry depends on, namely Government, operator, PH and the community, unite and work as true and effective partners for promoting each others roles, strengths and rights.

This competitive advantage that ideally should emerge from such a collective resolve would offer the following:

1. Competitively priced safari that offers a near disturbance free hunt in wild to semi-wild areas on large unfenced areas supporting exceptional trophy animals.
2. Accurately set hunting quotas that sustain a high hunting success rate of quality trophies
3. A simple and cumbersome-free procedure for purchasing animals
4. A varied range of hunting areas, thus offering more diversity to the hunting experience in Zambia.
5. Increased awareness of the unique roles both PHs and operators play in promoting conservation and quality service
6. Increased awareness of the importance each hunt contributes to wildlife conservation and the welfare of resident communities
7. Community gratitude for the client's decision to hunt in their area is expressed in a traditional and memorable manner.

The financial rewards for Zambia if such a competitive advantage were attained could lead to impressive gains over current revenue flows. These projections are illustrated below as crude approximations, though based on fairly conservative assumptions on the basis of information currently available. The potential appears to exist if all key elements for achieving competitive, high quality safari products for more than tripling current earnings over five years of revenue growth. For details on the basis of this project, see Annex II.



## Actions Recommended by Industry Stakeholders

### 1. Excessive use of wildlife, under-valuing the resource

- Wildlife culls should only be undertaken in consultation with the safari operator and his resident Professional Hunter to avoid conflicts with safari clients.
- NPWS as the overall management authority must provide clear controls to prevent problems of over-hunting, over-issuing of licenses, and over-use of special licenses from occurring.
- Special licenses issued by the Minister of Tourism should be based on a quota to insure sustainability of the resource and to protect the Minister from public criticism.
- Special licenses should not include prime species (lion, leopard, sable, roan and eland) nor should they be free. All State functions should pay for special licenses and not less than the rate of national game licenses.
- When special licenses are issued, Ministry of Tourism is asked to immediately relay this information to the safari operator of the area.
- Special licenses should be restrictive to a given area and for a given duration and should not be issued during the prime months of safari hunting (June – September).
- Exclusive hunting season for safari hunting considered essential for Zambia's safari hunting industry to be competitive.

## 2. Quota setting, regulations and controls

- a. Quota setting by full stakeholder participation as is now being implemented by ADMADE should continue but with closer consultation with operators to ensure resident PHs are present.
- b. Committee to approve quota recommendations set by stakeholder participation should include representation from PHAZ.
- c. Final quotas to be approved and made available to safari operators no later than 15 December.
- d. Under no circumstances should any quota for any category of legalized hunting be altered during the year once the quotas have been approved.
- e. Significantly higher animal fees are needed for national game licenses and the kwacha equivalent should be charged for prime species.
- f. A quota allocation of specialized safari animals needs to be issued to each operator so each company is guaranteed a certain number for marketing.
- g. To reduce culling disturbances of specialized lechwe safaris, operators may buy a second lechwe at 50% of full safari value but be required to return all meat to the community at a predetermined location for local meat distribution.
- h. Lechwe culls should reduce off-takes of males due to a growing sex-imbalance caused in part by past culls taking mostly males.
- i. Hunting of lechwe by shotguns or by chasing down from vehicle should be strictly forbidden and controlled.
- j. Professional Hunters as recommended by PHAZ should be gazetted as Honorary Rangers to assist with enforcement of controls in the hunting areas.

## 3. Licensing

- a. A simplified, single license system for safari hunting (see Annex 1) should be introduced in 1999 on a trial basis for evaluating its adoption and further refinement for 2000.
- b. Adoption of this single license system should include a provision for two separate payments based on shares owed to the community and to NPWS/GRZ. This will alleviate suspicions of community funds being misused and will insure greater accountability for their disbursements.
- c. A select group of individuals should be appointed by NPWS to set up the modalities of this pilot scheme to begin as early as 1 May.

## 4. Highly values species not being marketed

- a. ADMADE Coordinating Unit shall clarify the current situation of crocodile hunting to all operators and to PHAZ and shall help coordinate whatever efforts are needed to open crocodile hunting for the 1999 season.
- b. Zambia's current elephant population of over 20,000 can support a limited quota for safari hunting and would add dramatically to safari hunting revenues in the country. The Minister of Tourism is requested to reopen the issue of elephant hunting by safari hunting clients and ask that a special task force be set up to recommend what steps should be taken.

## 5. Low economic incentives for communities to produce wildlife

- a. Communities currently earn only 16% of total value from an animal license fee. Government taxes the total value by 50% as compared to only 15% for commercial agricultural products. For communities to be effective partners in



producing wildlife with their private sector partners, community shares from the animal license fees should increase substantially.

- b. Land use disturbances caused by local residents to reduce the burdens of rural poverty are making safari hunts more difficult to sell overseas. An increase in revenue shares to local communities should be adjusted for 1999 and this will make local communities more supportive of controlling such disturbances.
- c. Disturbances from commercial fishermen in safari hunting areas need urgent consultation with the Fisheries Department by the relevant NPWS Departmental Heads. Ideally, all commercial fishing should be excluded during the prime safari hunting months (June – September)

#### 6. Co-management relationship not well developed

- a. Conservation Bullet Certification should continue to recognize those operators committed to working with local communities as co-management partners.
- b. NPWS has the overall responsibility of enforcing lease agreements signed by the safari operators.
- c. All safari hunting areas under the current lease agreement initiated in 1996 should be retendered for 10 years when these leases expire at the end of 2000. Strong consideration for awarding new lease agreements be given to those operators who have received the Conservation Bullet Certification.
- d. PHAZ be allowed representation on the tendering selection committee.

#### 7. Hunting areas not fully utilized

- a. Government must be fully committed to compete in the international market of safari hunting and be made aware of the competitive advantage Zambia would have if Government protected the safari hunting areas from over-use of wildlife. Such protection requires enforcing the necessary controls and regulations and rewarding communities with the full commercial value of the wildlife resources they help produce.
- b. Unless Government does this, the private sector will never make the necessary investments and commitments to improve the quality of safari hunting areas and expand the area that could be made viable for safari hunting.
- c. If Government does make such a commitment, new lease agreements should require incremental growth in trophy off-take and client use of safari hunting areas.

#### 8. Negative public opinion toward safari hunting

- a. PHAZ will begin an effort to educate the public about the role safari hunting plays in conservation and the national economy through periodic newspaper articles.
- b. PHAZ and National Parks and Wildlife Service will provide joint leadership for an end-of-the-year safari hunting banquet to highlight achievements in the industry, ADMADE and wildlife management in general.
- c. Government should continue to play an active role in promoting Zambia's market overseas (e.g., conventions, internet marketing, etc.)

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## **Annex I. Single License System: ‘the model’**

1. Operator pays deposit of some amount, e.g. \$10,000, as surety against failure to pay a client’s trophies or animals hunted. This is done prior to hunting season.
2. Before clients begins hunt, operator does the following:
  - a) pays concession fee, two cheques required: one to NPWS (25%) and one to community (75%), payments in US Dollars at a centralized location (Chilanga)
  - b) upon payment collects single license form in triplicate.
3. Client arrives in area and produces receipt for concession fee and single license form to trained scout monitoring his hunt.
4. Client then proceeds to hunt according to what is allowed under the safari classification (mini vs classical) and what is available on quota. Control of quota is the responsibility of the management staff in the field.
5. At end of hunt all copies of single license form will reflect the individual species that were hunted (wounded or killed), endorsed by Client and scout monitor.
6. Copy of form to be left with the scout, submitted to the Unit HQ, copy to PH and a copy to NPWS HQ. Copy going to NPWS must be submitted within 30 days of hunt. Failure to do so will result in a monetary penalty compounded daily.
7. NPWS will calculate the share owed to the community for animals hunted and will bill the operator for that amount.
8. Within 7 days the operator will make two cheques, one for the community amount and one for NPWS.
9. License form once paid, stamped and signed by the appropriate authority is then used for export of skins (assuming that these forms can be gazetted as bona-fide licenses); otherwise the existing license is used to allow the client to legally export his skins.